

**PX24**

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Financial Disclosures for J. David T. Schultz

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2016201720182019

Agreements

Dates	Source	Parties and Terms
2017	Retirement savings plan with Maslon (former employer)	Retirement savings plan with Maslon (former employer)
2017	Retirement savings plan with Maslon (former employer)	Retirement savings plan with Maslon (former employer)
2017	Retirement savings plan with Maslon (former employer)	Retirement savings plan with Maslon (former employer)
2017	Retirement savings plan with Maslon (former employer)	Retirement savings plan with Maslon (former employer)
2017	Retirement savings plan with Maslon (former employer)	Retirement savings plan with Maslon (former employer)

Spousal Income

Date	Source
2019	Fairview Health Systems (salary)
2019	Fairview Health Systems (salary)
2019	Fairview Health Systems (salary)
2019	Fairview Health Systems (salary)
2019	Fairview Health Systems (salary)

Investments

Description	Gross Val. Code	Gross Val. Method	Income Code	Income Type	Trans. Type	Trans. Date	Trans. Value
Individual Assets (H)							
BMO Harris (cash) (X)	\$500,001-1,000,000 (O)	Cash Market (T)	\$2,501-5,000 (C)	Interest			
Hwyay Federal Credit Union (cash) (X)	\$1-15,000 (J)	Cash Market (T)	\$1-1,000 (A)	Interest			
Tri Enterprises, LLC (approx. 2% interest) (X)	\$15,001-50,000 (K)	Book Value (U)		None			
IRA #1 (H)							
UBS BANK USA DEP ACCT (cash)	\$15,001-50,000 (K)	Cash Market (T)	\$1-1,000 (A)	Interest			
ADOBE SYSTEMS INC (DELAWARE) (ADBE)	\$15,001-50,000 (K)	Cash Market (T)		None	Buy (add'l)	01/11/19	\$1-15,000 (J)
ADOBE SYSTEMS INC (DELAWARE) (ADBE)					Buy (add'l)	09/24/19	\$1-15,000 (J)

Notes

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